How to track WX Denial in ServTrag

You can create a contact action specifically to track WX denials by going to **Admin>Data Admin** and selecting data type: **Contact Action Administration.** Click on the *plus icon* to **add** a new contact action.

ect a data type: Contact	Action Administration	•				
	Contact Action Display 💡	Contact Action Description	Contact Type 💡	Contact Action Classification	Enable Barcode 💡	Active 9
🕞 🕲 🗙	>CHECK-IN CALL - WORK	CREW LOCATION CHECK IN CALL	0	WX		

Complete the fields required, and check the box "active". Finish by click on the *floppy disc icon* to **save**.

	Contact Action Display 💡	Contact Action Description	Contact Type 🛛 🕈	Contact Action Classification	Enable Barcode	Active Act	Ŷ
ontact Action Display:	DENIED FOR WEATHERIZA	TION	Contact Action Description:*	HOUSEHOLD NOT ELIGIE	BLE FOR WEATHERIZATIO	ON SERVICES	
Contact Type: *	0		Contact Action Classification	:* WX			
	Must be O for Outgoing or I for	Incoming		PA for Payment Assistance,	WX for Weatherization, or N	I/A	
Enable Barcode:*			Active:*	\checkmark			

Within the Customer Record, you can use the Contact Entry Note feature to track customers who are denied for weatherization services. You have the option to document additional information in the **Notes** section as well as creating a **mail letter**.

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	
Contact Date:	2/9/2017 11:22:22 AM	Contact Type:						
ontact Action:	DENIED FOR WEATHER	IZATION	•	Call Code:	NO ACTION RE	Q - RECORD ONLY	-	
anguage:	ENGLISH			Notes:	OVER INCOME			
failing Code:	DW - WEATHERIZATIO							
							💾 🙉	

To run a report on Denied weatherization customers entered: Go to Contacts> Customer Contacts

The vertex of the second secon	Customer Contacts									
Incoming Application Processing	Current View: Contacts Last 30 D	🖹 Ехро								
🙎 Customer Search/Contact Entry	Drag a column header here to gro	oup by that column								
😭 Callbacks	Customer 💡	Contact Date 💡	Contact Type	Ŷ	Contact Actio	n ç	Call Cod	e		
Eustomer Contacts	ERICA CARRILLO	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTI RECORD	ON REC		
🖉 Weatherization 👻	MARIA ABINA	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTI RECORD	ON REC		
Inventory Y	MARIA ABARCA	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTI RECORD	ON REC		
PL Descenter	MARIA AGUILAR	2/9/2017	OUTGOING		DENIED FOR		NO ACTI	ION REC		

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Click on the *filter icon* for **Contact Action** and check the box for "Denied for Weatherization" (Note: this can differ based on what you named the Contact Action) and click **OK**.

其 Custo	mer Contacts						
Current View: Co	ntacts Last 30 Days	View Customer	/Contact 😵 Refresh L	ist 📑 Export List 👻			Enter Search Criter
Drag a column he	ader here to group by that	t column					i
Ŷ	Contact Date 💡	Contact Type 💡	Contact Action	Call Code 💡	Language	Ŷ	Notes
10	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	Select All)			ALREADY WEATHERIZED
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	DENIED FOR WEATHERIZATION			ALREADY WEATHERIZED
۹.	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	PROGRAM/APPLICATION INFO GIVEN			ALREADY WEATHERIZED
R	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION				OVER INCOME
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	av and			ALREADY WEATHERIZED
ALEZ	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	RECORD ONLY			OVER INCOME
DZA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH		
	1/10/2017	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH		ADDED FROM APPLICATION E

Next, click on the **link** located at the bottom of the screen to open the *filter builder*. Here you are going to set the date parameter for your report.

Le Custo	mer Contacts					
Current View: Cor	ntacts Last 30 Days	▼ View Customer	/Contact 🛞 Refresh L	ist 📑 Export List 👻		Enter Sean
Drag a column he	ader here to group by that	column				
Ŷ	Contact Date 💡	Contact Type 🛛 🕈	Contact Action 💡	Call Code 💡	Language 💡	Notes
LO	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZ
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZ
A	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZ
R	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME
	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	ALREADY WEATHERIZ
ζALEZ	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	OVER INCOME
OZA	2/9/2017	OUTGOING	DENIED FOR WEATHERIZATION	NO ACTION REQ - RECORD ONLY	ENGLISH	
4	_					
Page 1 of 1 (7 iter	ms) 🔇 1 📀					
✓ ¶ <mark>[Contact A</mark>	ction] Equals 'DENIED FOR	WEATHERIZATION'				

Click on the *plus icon* to set your date parameters.



Click on "Call Code" and select "Entry Date"



Click on "Equals" and select "Is Between"



Enter a start and end date and click "OK"



Your results will generate in the screen. To **print** report click on the **Export List** tab. A drop down menu will appear and select from the options.

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SERV								Welcome 600	00GRojas [<u>Log Out</u>] [Chang	e Password] [Contact ServTraq S	upport]
Home v	Customer Conta	cts										
Incoming Application Processing	Current View: Contacts Last 30 D	ays 🔹 🤍 Viet	w Customer/Contact	0	Refresh List	B	Export List 🔻 🖌				er Search Criteria	30
& Customer Search/Contact Entry	Drag a column header here to gro	up by that column					Export to PDF					
Callbacks	Customer 👻	Contact Date 👻	Contact Type	٠	Contact Action		Export to XLS		Language	٠	Notes	
MEAD V	ERICA CARRILLO	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA		Export to XLSX	REQ -	ENGLISH		ALREADY WEATHERIZED	
Weatharization	MARIA ABINA	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA		Export to CSV	REQ -	ENGLISH		ALREADY WEATHERIZED	
Inventory *	MARIA ABARCA	2/9/2017	OUTGOING		DENIED FOR	TION	NO ACTION RECORD ON	REQ -	ENGLISH		ALREADY WEATHERIZED	
Reports *	MARIA AGUILAR	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTION RECORD ON	REQ -	ENGLISH		OVER INCOME	
Analytics 👻	AMANDA HOLT	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTION RECORD ON	REQ -	ENGLISH		ALREADY WEATHERIZED	
Administration 👻	AMANDA GONZALEZ	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTION RECORD ON	REQ -	ENGLISH		OVER INCOME	
	GLADYS MENDOZA	2/9/2017	OUTGOING		DENIED FOR WEATHERIZA	TION	NO ACTION RECORD ON	REQ -	ENGLISH			
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